William A. Dupont

Historic Site Stewardship at the National Trust

The historic sites open to the public across the United States—some sources say there may be as many as 8,000 of them—are important for a number of reasons. First, and most obviously, they give us the opportunity to see history, touch it, walk through it, learn from it. They also serve a significant civic function as community gathering places, neighborhood anchors, and a focus for local pride. Finally, they play a major role in the growth of the preservation movement: a visit to a historic site leads many people to their first realization that old buildings and neighborhoods are part of the fabric of their own communities—and that their communities would suffer if those places were to disappear.

Because they are so important—and so fragile—historic sites require the most conscientious stewardship from those entrusted with their care and interpretation. As the owner of a score of sites stretching from Massachusetts to California and spanning 250 years of American history, the National Trust has always sought to demonstrate the best in maintenance and management practices. Our efforts in this regard have recently been given a welcome boost by Graham Gund, one of this country's most distinguished architects, who has provided a very generous gift to endow a full-time architect's position in the Trust's Department of Stewardship of Historic Sites. William Dupont, the author of this article, is the first to bear the title of Graham Gund Architect of the National Trust—a title which symbolically links the best of contemporary design with the richness of America's heritage.

We hope that this overview of procedures and techniques will prove helpful to all who are involved in the challenging task of providing thoughtful, sensitive stewardship at historic sites. These places deserve our very best efforts, because they are much more than bricks and boards. They bring the past alive, lift it off the page and into the here-and-now. They help us understand why preservation is important. They are a tangible expression of the dreams of people long dead, an entryway into the community's collective memory. We can't afford to lose that memory—or the places where it resides.

Richard Moe
President, National Trust for Historic Preservation

They go by many names—maintenance superintendent, director of operations, buildings and grounds manager, clerk-of-the-works, maintenance technician, restoration project manager, staff architect—but their objective is always the same: proper care and stewardship of the historic site. There are 20 National Trust Historic Sites, and each has a variety of staff with different backgrounds and skills. The Historic Sites themselves are varied by, for example, age, materials, building type, size, and nature of landscape. Most significantly, the Sites are also varied by the size of their endowment, with almost all operating under financial constraints. When the funding is limited and the Site is large, the job of the maintenance superintendent can be extremely demanding, or as one National Trust maintenance superintendent recently said, "we do so much with so little for so long, that the expectation becomes to do everything with nothing forever."

The mission of the National Trust is to provide leadership, education, and advocacy to save America's diverse historic places and revitalize our communities. The National Trust's congressional charter from 1949 directs the organization, among other things, "to receive donations of sites, buildings, and objects significant in American history and culture, [and] to preserve and administer them for public benefit." The mission is achievable at the Historic Sites, but requires a lot of creative training, education, communication, and programs. If time and money were not restricted, the National Trust would do a lot more, both internally and externally, regarding preservation trades and crafts. But the reality is that the work of the National Trust is limited by the available funding sources: membership and donors. Individual Historic Sites can also earn income from admissions, special property uses, and gift shop sales, but not enough to generate surplus funds. This article explains some current practices at the National Trust Historic Sites in the hope that it will benefit other managers of cultural resources.

Purpose and Methodology of Conservation

Not all old properties are historic sites. The distinguishing characteristic of a historic site is education, which means offering the public a quality visitor experience and solid interpretive pro-

grams. There are numerous historic sites in the United States, all in the business of education in some form or another. Visitors to these sites expect that buildings and grounds will be clean, safe, and restored (or simply preserved), as well as properly maintained. Because the maintenance superintendent has day-to-day control over what visitors see (in the same way the tour guide controls what visitors hear) their role is critical. The physical artifacts (landscape, structures, and objects) are the *raisons d'etre* of the site, as well as the delivery vehicle for educational messages.

At National Trust Historic Sites, the maintenance responsibilities are typically divided into two related categories: collections and buildings/grounds. But regardless of staffing particulars, the ongoing care of the built environment is the primary challenge of the maintenance personnel, with the custodial and janitorial aspects of the work being the largest consumers of time. In addition, the maintenance superintendents need to have good knowledge of all the relevant preservation trades and crafts for their site, and in accomplishing their objectives, must be part horticulturist, construction manager, office administrator, industrial hygienist (site safety), and above all, architectural conservator.

The portion of the work that is architectural conservation requires the ability to follow a unique process, or methodology, of decision making to determine appropriate actions, interventions or treatments. At the outset, one must be thoroughly familiar with a fair amount of background information which can be broadly divided into two categories: historic significance and use. Historic significance, typically cultural, architectural, or associated with an event, must be known for the site, the feature or structure at hand, and the actual material or object under consideration. The historic uses, and the chronology of physical change they may have brought upon a structure, must also be known, along with a complete understanding of the current or proposed uses. The maintenance superintendent must gain this knowledge by any means possible, but it is most frequently found in the various documents of scholarly research and primary source archival material. This type of essential information is typically brought together in one comprehensive planning document, such as a Historic Structure Report. Unfortunately, some National Trust Historic Sites do not have this body of knowledge organized and readily available because of the great expense involved. In any event, the process of learning the existing (and usually growing) knowledge based on historic significance and use at a particular site can take months, even years. Pride and a sense of ownership, and also the need to make informed decisions, drive the maintenance personnel to study, read, attend lectures, and otherwise learn what they must know.

National Trust maintenance superintendents on tour at Kykuit, Tarrytown, NY, during a recent conference. A behind-the-scenes tour of another site is an excellent educational and motivational tool. Photo by John Kidder.

A recent masonry preservation workshop at Montpelier, Orange County, Virginia was attended by seven staff members from National Trust Historic Sites. Technical training is important for practitioners as well as managers. Photo by Mark Haskins.

At many historic sites the proposed use is a period restoration of a structure and adjacent landscape that will be open for public tours. Although levels of sophistication are possible regarding historical significance and use which will affect the outcome of conservation treatment decisions, the process of making the decisions should always be the same. The steps in the methodology of architectural conservation can be briefly summarized as follows: study the problem, find the cause, execute the solution. The symptoms of a problem will sometimes distract, and budget constraints will tempt one to defer treatment of the real cause, but these pitfalls must be avoided. At National Trust Historic Sites, the decision making process of architectural conservation is rigorously followed because it is good stewardship.

Document for the Future

Mechanisms, procedures, and policies must be in place at all historic sites which serve as training tools and guides for the future. Chief among these is archival recordkeeping, which includes completion reports for capital projects, as well as maintenance logs with information on the daily routine. The standard completion report is a brief narrative description of the project, with labeled photographs, plus a listing of all relevant personnel, including consultants and contractors. Documents generated during the course of the project, including as-built drawings, are archived with the completion report. Looking at past activities allows predictions of future performance of products and materials, as well as frequency of service and repair. The log provides information on what has worked and what has not. Together, the completion reports and the logs provide an excellent source of information for assessment of an existing problem—highlighting trouble before it becomes more serious. And finally, these documents are wonderful training tools for new staff.

Develop a Maintenance Plan

The National Trust is a strong advocate of maintenance planning, and frequently offers educational sessions on this topic at its national preservation conferences. All building owners and managers recognize the value of maintenance, but the value of maintenance planning is often overlooked, and it is a very important component of good stewardship for a historic site. The first objective of a maintenance plan is to foster more planned and less unpredicted maintenance. With good prediction, action can precede system failure or material loss. Long-term cyclical improvements can be charted and scheduled, with the advantage that both staff and finances are budgeted in advance of the need. Unpredicted maintenance, especially a crisis or emergency, is undesirable because it corresponds with loss of historic fabric and authenticity, and ultimately decreases the cultural value of the property.

A good maintenance plan also includes two major benefits which can save time and money—the task list and the schedule. The task list breaks down the maintenance into smaller tasks which are easier for everyone to identify, prioritize, and accomplish. The schedule allows tasks to be purposefully spread out, gives staff the opportunity to plan ahead to perform similar tasks in one operation, and helps control the frequency of tasks. Consequently, economies of scale are realized, staff time is effectively allocated, and efforts are focused on the most important items.

Continuity is another important benefit of the maintenance plan. New staff can be trained faster and easier, and they will not lose ground as readily in situations where they come in without an overlapping training period. The plan becomes a useful tool that is constantly available to all personnel. As time passes, the plan also functions as a progress chart, and accomplishments are recorded in the process.

Meet and Confer with Peers

All National Trust Historic Sites develop their own maintenance plans, usually based on a shell document (essentially an outline) provided by the headquarters office. In order for the plan to work, rather than remain untouched on some library shelf, it should be written, implemented, and utilized by the on-site maintenance personnel. This is often a daunting task, so the National Trust holds a biannual conference of maintenance superintendents to help keep the process going.

Trimming slate at Brucemore, Cedar Rapids, Iowa, a roofer provides informal training. Whenever an outside contractor completes work, staff can take the opportunity to learn about installation, ongoing care, and maintenance. Photo by William J. Stevenson.

The real significance of the conference is very simple—it refocuses personnel on preservation issues. Over the years between conferences, the superintendents tend to be weighed down by janitorial, lawn care, and special event responsibilities, as well as the stress of operating on limited budgets which inhibit pursuit of restoration projects. The social interaction at the conference reinforces their very important functions, and the interaction with peers from other sites—simply talking about common problems and sharing success stories—is a tremendous benefit. Tours of other historic sites—two or three are arranged for each conference—have also proven to be excellent for ongoing education and motivation.

The conferences also have educational sessions, typically focused on site and workplace safety, disaster preparedness, maintenance planning, administrative procedures, and techniques to help achieve the daily responsibilities of the job. Sleepy slide shows are avoided, and every effort is made to offer lively presentations and activities. The conference is planned and presented by personnel from headquarters and the sites, with only

Preservation work was explained during the construction process at Pope-Leighey House, Mt.Vernon, Virginia (Woodlawn Plantation). Good job site tours, which require a collaboration with the contractors and artisans, are always popular as well as educational. Photo by the author.

a few invited speakers to address specific topics. The agenda of the next conference will integrate technical workshops and hands-on demonstrations of preservation skills.

Conduct Training Programs

Success with technical training workshops was recently demonstrated at Montpelier, where a three-day masonry workshop was attended by seven staff members from National Trust Historic Sites. These small, highly focused training sessions can be very effective for those who will practice what they learn, as well as for those who manage projects. Appreciation and solid working knowledge of a preservation skill is more often what is required rather than mastery of the skill. For large jobs, and any projects that involve trades and crafts outside the ability of on-site staff, the work is contracted out to qualified firms and individuals.

The use of outside contractors can be an informal part of the training program. Whenever someone comes on site to do a job, the maintenance superintendent has the opportunity to learn new techniques and methods which can be applied to future projects. In addition, it is very important to gain the knowledge necessary for the ongoing care and maintenance of the recently completed work. For example, a new slate roof was recently applied to the mansion at Brucemore, and the specifications required the roofer to supply a set of slater's tools and provide instruction on how to execute repairs.

The education of staff who are responsible for the stewardship of National Trust Historic Sites is a collaborative effort, requiring a running dialogue among all the players. The primary conduit for the transfer and dissemination of information is the staff at Trust headquarters in Washington, but knowledge frequently flows from the sites back to headquarters. In this sense, everyone has to be a sponge, soaking up knowledge from any viable source and then making it available to others at the right place and time. Good communication is key, and the Internet will play a major role as well as continued use of the telephone, telefax transmissions, and simple newsletters.

Integrate Ongoing Preservation Work

The mission of the National Trust also calls for a broader reach of educational initiatives. At the Historic Sites, this is mostly achieved through the standard interpretive tours, programs, and special events which address the history and significance of the site. However, Historic Sites also have an extra advantage they can offer to visitors. Because the work of preservation, including trades and crafts, is practiced at the sites, visitors can observe and learn something in addition to the standard historical interpretation. These issues of care and stewardship often relate to what the visitors do at home or with volunteer groups.

Methods to achieve integration of preservation work with the visitor experience are varied, and can be casual or purposeful. At Lyndhurst, for example, visitors have been able to witness ongoing restoration of decorative plaster ceilings. This process requires that the guides receive a good explanation of the preservation work visitors will see. The guides can then describe the work to visitors. When an outside contractor is employed, as at Lyndhurst, good collaboration is also necessary so that specific questions can be handled in a professional manner and without undue interruption of the contractor's work.

During the recent relocation and restoration of Frank Lloyd Wright's Pope-Leighey House, interpretation of the preservation work was purposeful. Specific tours of the work site were organized and the restoration carpenter in charge of the work devoted time from his busy schedule to explain what was happening. The tours were popular among architectural students, and all participants developed a better understanding about historic site stewardship and the specifics of restoration carpentry. Due to the importance and success of many such initiatives, all contracts let for preservation work at National Trust Historic Sites now include provisions for collaboration on public education.

Outside consultants from the fields of architecture, engineering, and conservation are often necessary to help assess conditions, design solutions, and observe construction. These consultants can also become part of the public education objectives. A clause now added to all consultant contracts requires submission of an article about the work suitable for publication in a scholarly journal such as *Preservation Forum*. The goals are

to promote and disseminate solutions to technical preservation issues, and to showcase the work accomplished at National Trust Historic Sites. In addition, the consultants are expected to make presentations, in collaboration with National Trust staff, about their work.

Capitalize Volunteer Participation

For the maintenance superintendent, perhaps the most gratifying technique of public training and education is through volunteer and internship programs. Filoli, in Woodside, California, has approximately 1,000 volunteers, many assisting with the care of their 654 acres, which include large formal gardens. Lyndhurst, in Tarrytown, New York, uses students from the North Bennet Street School to perform a variety of restoration projects. The goal is to get outsiders involved in a constructive manner beneficial to both parties. To be productive and successful, volunteer and internship programs require a lot of administrative work, careful planning, thoughtful training, and attention to individual needs of participants.

Promote Preservation Scholarship

Of course, the most traditional ways to promote preservation work and offer educational content are by lecture at conferences, and by writing articles and books. The National Trust has always promoted and sponsored its employees and others to expand the body of preservation scholarship, and will continue to do so. Staff have written and contributed to books and articles, offered numerous lectures and presentations, and frequently volunteer technical advice as time allows. An example of this ongoing initiative was the National Preservation Conference in Santa Fe (October 14-19, 1997), where a full day of educational sessions was devoted to technical topics of interest to stewards of historic sites. All of these venues for education of the public provide direct training, and foster a preservation ethic and greater appreciation of the trades and crafts necessary for quality care of historic sites.

There are two other significant methods to reach large audiences with a preservation message using historic sites— television and the Internet. These venues are underutilized or unavailable for most individual historic sites, although the world of communication is rapidly changing. Many National Trust Historic Sites are featured on A&E's "America's Castles," and there will be a PBS show released this fall, "About Your House," which is sponsored by the National Trust and will include footage of ongoing preservation work at Brucemore, in Cedar Rapids, Iowa, and Chesterwood, in Stockbridge, Massachusetts. The National Trust website <http://www.nthp.org>, recently rated a "top pick" by *USA Today*, is already an excellent source of information on preservation issues and a popular destination for "net surfers." Content on preservation work, of interest to both homeowners and managers of historic sites, will be added as the website continues to grow and develop.

Interns assisted with the restoration of the Bowling Alley at Lyndhurst, Tarrytown, New York. Volunteer and internship programs get outsiders involved in a constructive manner beneficial to all parties. Photo by David Overholt.

Conclusion

Leadership, education, and advocacy are sound objectives for the only nationwide, private, non-profit historic preservation organization. However, they are also lofty aspirations which are sometimes easier to talk about than to achieve. The maintenance superintendent's contribution to the mission of the organization begins by setting good examples. Whether the work is performed with on-site staff or with assistance from outside consultants and contractors, the objective is the same—to practice the highest possible quality of stewardship and be a model of preservation excellence. Beyond this straightforward yet formidable objective, the other components of preservation education at the Historic Sites are born of necessity and opportunity. When the education is needed for maintenance staff, it is acquired or provided within the constraints of available resources. When the opportunity presents itself, education is offered for the public benefit, and the Historic Sites serve as advocates of good preservation practice.

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